



Your Will

CLIENT QUESTIONNAIRE

Please complete this questionnaire as fully as possible before you see us. We will go through it with you, discuss your wishes and then prepare your Will ready for you to sign.

Details of your appointment if made are set out below.

FIRM'S REPRESENTATIVE : MARK FRANCIS/JANE SULLIVAN

APPOINTMENT DATE: _____ TIME: _____ AM/PM

PART A - YOU AND YOUR FAMILY

1. YOUR DETAILS

Forenames.....
Surname.....
Address,
.....
..... Postcode,
Telephone Number,
Date of Birth,
Occupation

Are you (or any member of your family) known by any other names and do you own any assets in a different name? If so please give details below:
.....
.....
.....

2. YOUR HUSBAND / WIFE / PARTNER

Forenames,
Surname,
Date of Birth,
Occupation

3. MARRIAGE / PARTNERSHIP DETAILS

(a) Year of Marriage.....

(b) Please tick this box if you are not married to your partner

(c) Please tick this box if you are intending to marry / re-marry in the near future

(d) Has either of you been married before? Yes No

4. YOUR CHILDREN

(Including your children from any previous marriage or relationship) - full names, dates of birth, and address if different from yours

(a) Name.....
Date of Birth,
Address

(b) Name,
Date of Birth,
Address

(c) Name,
Date of Birth,
Address

(d) Name,
Date of Birth,
Address

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5. CHILDREN OF YOUR HUSBAND / WIFE / PARTNER'S PREVIOUS MARRIAGES OR RELATIONSHIPS -

full names, dates of birth and address if different from yours

(a) Name
Date of Birth
Address

(b) Name
Date of Birth
Address

(c) Name
Date of Birth
Address

Please note:

- * Illegitimate and adopted children (but not stepchildren) generally have the same rights of inheritance as other children.
- * Children excluded from benefit under your Will may have a right to claim a share of your property in certain circumstances. Please ask for advice, if appropriate.

PART B - YOUR HOME AND OTHER ASSETS

6. YOUR HOME - is your home

(a) Owned:

(i) in your name alone? Yes No

(ii) in joint names with your husband / wife / partner? Yes No

(iii) in the name of your husband / wife / partner? Yes No

(iv) approximate value £

(vi) amount left on mortgage £

(b) Rented? Yes No

(c) Other - e.g. provided by a relative? Yes No

7. IF YOUR ANSWER WAS (c) Please give more details

.....
.....
.....
.....

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8. DO YOU HAVE A BUSINESS? Yes No

If yes:- state type of business and approximate value

.....
.....

Is it a (tick box):

Company Partnership In your sole name

9. YOUR MAIN ASSETS

Please list your other main assets below and give approximate values

.....
.....
.....

10. JOINT ASSETS

Do you have any jointly owned assets? If yes, please give a general description, and their approximate values, and the names(s) of the other owner(s).

.....
.....
.....

Please note:

Jointly owned assets generally pass to the other joint owner automatically and cannot be given away by Will.

11. DO YOU OWN ANY ASSETS ABROAD?

If yes, please give details:-

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.....
.....

PART C - FUNERAL, EXECUTORS, GUARDIANS

12. FUNERAL

You may specify in your Will if you wish to be :-

Buried Cremated No Preference

Please note:

* You should make these wishes known to you immediate family as well and not rely on what is in your Will.

* If you wish to leave any part of your body for medical purposes tell your family and your doctor and carry a donor card.

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13. EXECUTORS.

You must appoint executors to carry out the instructions in your Will. It is wise to have at least two and you may appoint your husband / wife / partner as one. You should name other executors to act if he / she is unable to do so. Partners of our firm will be pleased to act as your executors, either alone or with a member of your family or friend.

Would you like partners from our firm to act as your Executor(s)? Yes No

If reply is no:- List below up to four chosen executors.

- (a) Name Address
(b) Name Address
(c) Name Address
(d) Name Address

14. GUARDIANS

You may want to appoint one or two people to act as Guardian(s) for children under 18. The appointment will usually only apply if you and the child's other parent are both dead. The position may be different if you are a single parent. Discuss this with the solicitor at your appointment. Guardianship involves a lot of responsibility and you should ask people to agree to act before appointing them.

- (a) Name Address
(b) Name Address

PART D - BENEFICIARIES

The main part of your estate is called "the residue" (This is dealt with at question 17.) Before giving away the residue you may wish to make certain gifts of cash or personal belongings to individual children, grandchildren, friends or to charities. These will be known as "beneficiaries".

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15. CASH GIFTS.

Please give the name and address of the beneficiary and the amount to be given, with the age of anyone who is under 18.

- (a) Name Address Amount £.....
(b) Name Address Amount £.....
(c) Name Address Amount £.....
(d) Name Address Amount £.....

16. GIFTS OF ARTICLES

Please give the names and addresses of people to whom you wish to leave specific items and a full description of the article, to enable it to be identified. Please note that if you sell or replace one of these items, the beneficiary will get nothing - he or she will not be given the substituted item or the cash equivalent.

- (a) Name Address Article
(b) Name Address Article
(c) Name Address Article
(d) Name Address Article

Cont. p.4, top of first column

17. THE RESIDUE

This is all that you own except jointly owned property and gifts made in questions 15 and 16. Please state below who is to receive the residue on your death and who is to receive it if they die before you. If there are gifts to your children, we suggest a provision that if any of them dies before you, leaving children of his / her own, those children (your grandchildren) will inherit their parent's share.

The following are the more common provisions made. If you wish to use one of these tick the appropriate box; if not please go to question 18.

- (a) Everything to my husband / wife / partner named at question 2 above, outright, but if he / she / had died then to my children, named at question 4 above equally;
- (b) Everything to my children, named at question 4 above, equally and any other children of mine;
- (c) In the case of (a) and (b), if they are young, you must choose the age at which your children will receive their entitlement. Insert choice from 18, 21 or 25 years in this box;
- (d) To my husband / wife / partner named at question 2 above, but if he / she has died before me to the person(s) / organisation(s) named below. If not in equal shares, then show the share each is to take.

.....



18. IF NONE OF THE ABOVE CHOICES IS APPROPRIATE

Please set out below who is to receive the residue and if more than one person or organisation is involved, in what percentage shares?

- (a) Name
 Address
Share.....
- (b) Name
 Address
Share.....

Who is to benefit if the recipient dies before you?

- (a) Name
 Address
Share.....
- (b) Name
 Address
Share.....

Important Notes

1. A Will is usually completely cancelled if you marry after making it. You will need to make another Will immediately, or one which takes a forthcoming marriage into account.
2. On divorce, gifts to your husband / wife are cancelled as is his / her appointment as executor but the rest of the Will stands. This can create problems and it is better to make a new Will.
3. If you are not making any provision for a husband / wife / partner / child / former partner / or another person dependent upon you, it is possible that he / she could make a claim against your estate. If this does apply please seek further advice from us.
4. We need to verify your identity and address. Please bring to the appointment :
 - (a) your passport **or** photo driving licence **and**
 - (b) a utility bill or bank statement showing your name and address which must be no more than three months old. Please note that we must see the original of these documents. Photocopies are not acceptable.